

## **TRANSPORTATION AUTHORITY OF MARIN REQUEST FOR QUALIFICATIONS**

### **I. PURPOSE AND AVAILABLE INFORMATION**

The Transportation Authority of Marin (TAM) is the agency responsible for implementation of Measure A, a one-half cent transportation sales tax and is also responsible for Congestion Management Agency duties for Marin County. TAM invites team or individual Statements of Qualifications from qualified firms for consulting services related to the implementation of Measure A and the establishment of TAM as an independent agency.

Information on Measure A and TAM is available at [www.marintraffic.org](http://www.marintraffic.org).

### **II. REQUESTED SERVICES AND SCHEDULE**

TAM is looking for qualified firms to provide consulting services related its work program. A draft work program and timeline is attached. The Qualifications submittal should address the consultants' abilities and relevant experience to perform some or all of the following critical tasks in either category (or both) in the context of the scope of services proposed:

#### **TRANSPORTATION**

- Development of project controls and the overall management of program/project scope, schedule and budget
- Development and application of criteria for project prioritization
- Development of performance standards and reporting requirements for claimants
- Participation in a public environment, effectively conveying technical information to decision makers to facilitate key policy decisions
- Facilitation of committee meetings
- Development of complex financial systems and accounting procedures
- Ability to advise on state and federal funding programs managed by congestion management agencies and the roles of congestion management agencies and regional transportation planning agencies
- Development of a Strategic Plan for a transportation agency, including revenue projections, debt financing and scheduling of projects/programs based on sales tax, state and federal funding sources
- Development of a Congestion Management Plan
- Development of public outreach and education program and materials
- Ability to advise on organizational structure, classification and compensation of employees

- Knowledge of best practices of other similar public agencies
- Development of a transportation agency 2-year work program and budget
- Although MCTD has the primary responsibility for developing a Short Range Transit Plan, TAM also needs advice on fixed route transit planning, paratransit and other special needs programs in its role in developing a Strategic Plan, and authorizing Measure A expenditures
- Preparation of Community Based Transportation Plans
- Oversight of Caltrans for a highway project
- Ability to advise on project elements and process for implementing local street and road projects

### ADMINISTRATIVE/ORGANIZATIONAL

- Development of office administrative procedures and filing systems, records retention schedules
- Development of complex financial systems and accounting procedures
- Development of needs for office space based on organization structure

TAM is not requesting qualifications for a Financial Advisor (Task 59), RM2 Greenbrae Corridor (Task 73) or Bike Plan Update (Task 89) at this time. A separate RFQ or RFP will be issued in the future.

### **III. SUBMITTAL REQUIREMENT**

**Qualification statements must be received no later than 5:00 p.m. on January 21, 2004.** Seven copies of your proposal should be mailed to:

Craig Tackabery  
Executive Director  
Transportation Authority of Marin  
PO Box 4186  
San Rafael, CA 94913-4186

Or, seven copies of your proposal may be delivered to:

Craig Tackabery  
Executive Director  
Transportation Authority of Marin  
3501 Civic Center Drive, Room 304  
San Rafael, CA 94903

### **IV. EVALUATION AND AWARD PROCEDURES**

As part of a qualifications-based selection process, an evaluation panel will evaluate all qualification statements and a ranking of the most qualified consultants will be developed. The evaluation panel will be drawn from qualified professionals. TAM reserves the right to

select individual consultants or select a team, and to request another consultant replace a member of a team. The top ranked consultants will be scheduled for interviews in early February 2005. After interviews, the selected consultants will participate in a workshop with TAM in late February to discuss the scope of work for tasks in the Work Plan. After the workshop, contract negotiations will be conducted with some contracts awarded at the March 24, 2005 meeting of TAM. Some efforts not deemed to be on a critical path may be awarded later. If an agreement cannot be satisfactorily negotiated with the top ranked consultants, negotiations will be terminated with the top ranked consultants and negotiations with the second ranked consultants will commence.

Evaluation criteria include:

- Consultant's history and resource capability to perform required services
- Evaluation of assigned personnel, particularly the project manager
- Related experience
- Budget, cost controls experience
- Understanding of local issues
- Understanding of Work Program requirements
- Reference checks

## **V. SUBMITTAL REQUIREMENTS**

The qualification statement should include:

1. Name, title, address, email, and telephone of the individual to whom correspondence and other contacts should be directed
2. A discussion of the overall approach the consultant intends to take, with insight into the work plan
3. Suggestions on tasks not included in the work plan that are deemed necessary
4. Suggestions of proposed alternatives to tasks in the work plan which might enhance services or reduce costs
5. An organization chart for each consultant, and if submitting as a team, an organization chart for the team
6. Resumes of key personnel proposed to be assigned to tasks in the work plan, highlighting their experience on similar tasks
7. Billing rates for personnel for each consultant
8. A description of the firm's experience on similar tasks, with the following information:
  - a) Client and client project manager contact information
  - b) Description of tasks, and role of key staff proposed
  - c) Total value of services provided
  - d) Budget performance
  - e) Schedule performance
  - f) Key personnel involved

- g) Other consultants that were part of effort and their relationships
- 9. Current and future firm and personnel commitments to other clients in sufficient detail to confirm consultant's ability to commit to this effort
- 10. Willingness to accept the terms and conditions in the Standard Short Form Professional Services Contract (copy attached) or list those to which it takes exception, and provide proposed alternate wording. It is not TAM's intent to make substantial changes to the Standard Short Form.
- 11. You are invited to include a maximum of one page of additional information not included above, if you feel it may be useful and applicable.

The qualifications statement shall be organized in the above order under the above headings for ease of review by the review panel. The qualifications statement should be a maximum of twenty pages.

## **VI. QUESTIONS**

TAM has very limited staff at this time and is not able to respond to individual questions by phone or email, or to meet with consultants. TAM will offer a pre-qualification submittal meeting to answer questions, which will be held:

January 5, 2004  
9:00 AM to noon  
Marin County Civic Center, Room XX

There will be a sign-in sheet at the door. There will be a brief overview of the draft Work Program and then questions will be taken in the order in which the firms are signed up. Each firm will have the opportunity to ask two questions. Once all firms have had an opportunity to ask their two questions, we will return to the top of the list to allow two additional questions per firm.